



RECORDS RETENTION AND DISPOSITION SCHEDULE

Public Retirement System, Indiana

Agency: Public Retirement System, Indiana		Division:	
ITEM NO.	RECORD SERIES	TITLE/DESCRIPTION (This Retention Schedule is approved on a space-available basis)	RETENTION PERIOD
1	2014-08	FUND MEMBER RECORDS The record contains active, inactive, vested rights, retiree, disability and deceased membership records, and member and employer correspondence, electronically linked based on member identification. Records may be received in hard copy or born-digital format. (Formerly retained under Record Series 2000-63 and 2001-46.)	IMAGE any hard copies according to IARA imaging standards, and DESTROY after verification of images for completeness and legibility. TRANSFER one (1) copy of electronic records along with an index to the INDIANA ARCHIVES for permanent archival retention by at least the end of each calendar quarter, in a format approved by the Indiana Archives staff.
2	79-2970	PLAN SPONSOR FILES Employer-related files maintained within the Filenet software system. May include employer resolutions, correspondence, agreements, and additional supporting documents. Records may be received in hard copy or born-digital format.	Pre-2008 hard copies located in the RECORDS CENTER: TRANSFER to the INDIANA ARCHIVES for permanent archival retention, fifty (50) years after listed records date. Post-2008 records: IMAGE any hard copies according to IARA imaging standards, and DESTROY after verification of images for completeness and legibility. TRANSFER one (1) copy of electronic records along with an index to the STATE ARCHIVES for permanent archival retention by at least the end of each calendar quarter, in a format approved by the State Archives staff.
3	2018-03	WAGE AND CONTRIBUTION DATA RECEIVED FROM PLAN SPONSORS Formerly maintained as a part of Record Series 79-2970, this is raw fiscal data on wages and contributions, received only in electronic format.	DELETE electronic data ten (10) years after listed records date.
4	2018-04	PUBLIC RETIREMENT SYSTEM PERSONNEL FILES The Public Retirement System's documentation of the employee's working career with the agency; this includes full-time, part-time, and temporary employees as well as paid and unpaid interns. Typical contents could include the Application for Employment, PERF forms, Request for Leave, Performance Appraisals, memos, correspondence, complaint/grievance records, miscellaneous notes, the Add, Rehire, Transfer, Change form from the Office of the Auditor of State, Record of HRMS Action, and/or public employee union information. Disclosure of these records may be subject to IC 5-14-3-4(b)(2)(3)(4) & (6), and IC 5-14-3-4(b)(8) This is an exception to Record Series GRPER-5 on the General Retention Schedule for all state agencies, because INPRS is a quasi-state agency whose records are not collected by the Indiana State Personnel Department.	One (1) year after the employee leaves the state government agency or at the conclusion of any litigation, whichever is later, TRANSFER to the STATE ARCHIVES for permanent archival retention. MAINTAIN a list of previous employees permanently within the agency, based on the information found in the inactive personnel folders, including employment dates, classification, and rehire eligibility status.
5	2018-05	1977 FUND BASELINE EXAMS - DENIED Applications and supporting medical exam records for applicants to the 1977 Police Officers' and Firefighters' Pension and Disability Fund who did not qualify for membership. Disclosure of these records may be affected by IC 5-14-3-4(a)(9) and the discretion of a public agency per IC 5-14-3-4(b)(8) and 29 CFR 1630.14(b)(1).	DESTROY one (1) year after denial of application.